# TABLE OF CONTENTS

## THE BENEFITS
- Predictability .....................................................................................................3
- Cost savings ......................................................................................................3

## THE PROCESS
- Overview of setup ............................................................................................. 4
- Billing options .................................................................................................. 4
- Transition month ............................................................................................. 5

## MAXIMIZING YOUR LMA SAVINGS ............................................................. 6
- Adding titles ..................................................................................................... 6
- Eliminating titles .............................................................................................. 6
- Swapping titles ................................................................................................ 6

## SAMPLE INVOICE & DEFINITIONS ...............................................................7

## MANAGING YOUR LMA THROUGH MY ACCOUNT ........................................8
- The LMA allocation report .............................................................................. 9
  - Example ......................................................................................................... 9
  - How allocations are generated ....................................................................10
  - Frequently asked questions .......................................................................10
- Other information available through My Account ........................................ 12
  - Payment history ..........................................................................................12
  - Credit history ...............................................................................................12
  - Billing & payment .......................................................................................13
  - Invoice location ...........................................................................................13

## FREQUENTLY ASKED QUESTIONS ................................................................14

## ABOUT THOMSON REUTERS WESTLAW PRINT PUBLICATIONS ..........16

## CUSTOMER CONTACTS ............................................................................17
THANK YOU FOR PARTNERING WITH THOMSON REUTERS!

Thomson Reuters created the Library Maintenance Agreement (LMA) to help you more effectively and easily maintain your library. The LMA provides you with a streamlined billing plan that will help your organization save money, cut administrative time, and simplify the library budgeting process.

We are providing this handbook to you as a resource that you can refer to now and in the future – whenever you have questions or want more information about the LMA. If you have further questions not covered by this handbook, please refer to the contact information found on page 17.

We appreciate your business and look forward to partnering with you to ensure the most efficient, productive management of your organization’s legal resource collection.
THE BENEFITS

The Library Maintenance Agreement (LMA) is a single-subscription contract covering the Thomson Reuters Westlaw™ print publications within your library. Best suited for customers with large libraries like yours, it incorporates a multiyear, fixed monthly rate plan that:

- Increases your ability to accurately predict costs.
- Saves you money without reducing the quantity or quality of your print holdings.
- Equalizes your monthly payments.
- Offers labor savings and convenience through simplified bill-paying and bookkeeping.

PREDICTABILITY

Government agencies, law firms, schools, and businesses are looking to use multiyear forecasting, planning, and budgeting to improve their cost-effectiveness. The LMA assists in that effort by making it easier for librarians and managing partners to accurately predict the cost of legal research materials in print.

- Your Thomson Reuters Westlaw print bill stays the same from month to month within a year. This is in marked contrast to the billing peaks and valleys that occur with individual subscriptions, which may be initiated, renewed, and updated at various times throughout the year.
- You know what you will be paying for Thomson Reuters Westlaw print titles for several years in advance.

COST SAVINGS

Are there real cost savings with an LMA? Absolutely:

- Your pricing is fixed, so it is unaffected by subscription price increases, as well as additional materials and volumes shipped to you as part of any subscriptions included in your LMA.
- All updates are included.
- The agreement may preserve existing discounts (certain discounting requirements may apply).
THE PROCESS

OVERVIEW OF SETUP

Many of our customers have multiple payer accounts. Each account is invoiced on the 4th of the month and can be viewed on My Account.

A payer account is an account that issues a check for an invoice. Many payer accounts include multiple locations (ship-to accounts) that receive Thomson Reuters Westlaw print publications. For example, a large law firm, corporation, or government agency may have 20 separate ship-to locations with invoicing up to 10 payer accounts.

The LMA allows customers to roll all payer and ship-to accounts to one invoice or to have each of the payer accounts receive an invoice for its allocated portion of the LMA charges.

Under an LMA, one-twelfth of the agreement’s pre-tax annual fee is allocated each month across accounts, whether an account is a location, department, or other subdivision of your organization. See below for additional details regarding billing options.

BILLING OPTIONS

OPTION A – SINGLE INVOICE

Best suited for organizations that do not require office-level budgeting, the single invoice option begins when all of your payer accounts and ship-to accounts are consolidated into one monthly bill. This represents all libraries/locations covered by the LMA. The bill shows shipping detail for each library/location during a given month and the portion of the agreement’s charges billed to the account. We will send the bill to any one location you designate. (Other locations can view, download, and print the invoice on My Account – see page 13.) Subscriptions generally are not moved from one account to another. The invoice also provides line-item pricing for any titles that are not included under the agreement.

Depending on your current account structure, migrating to the one-bill option may require some of these changes:

- All accounts under the LMA are tied to the same account group (common Master Account).
- All accounts under the agreement must have a common payer account, and all charges that are not under the agreement are billed either to:
  - The agreement’s payer account, or
  - The individual ship-to accounts
- Debits or credits as subscriptions are moved to accommodate billing preferences.

This allows for accurate valuation of the total print library on a monthly basis, as well as centralized management of print costs within a large organization.
OPTION B – LOCATION-LEVEL INVOICING
With this option, LMA values are separately invoiced to each library/location based on snapshots of its print inventory. These snapshots are taken monthly and matched to the total LMA fixed charges. Each month, the library/location invoice automatically adjusts to account for changes in library subscriptions and print title allocation. This allows for an accurate depiction of the status of your print titles for that month.

The invoice also provides line-item pricing for any titles that are not included under the agreement. Location changes in LMA print title subscriptions may result in variance to location-level budgets.

OPTION C – FIXED VALUE BY LOCATION
With this option, the per title values are established by calculating what portion of the entire library ships to which location. The percentages are then used to allocate monthly charges to each sold-to location.

As values are based on a fixed percentage during the entire length of the LMA, any changes in print subscriptions may make the per title values incorrect for some locations, as the allocations are NOT adjusted at the location level.

The LMA invoice may be sent to one location or to each individual location. The invoice also provides line-item pricing for any titles that are not included under the agreement.

This option is best suited for organizations 1) that have locations whose library collections do not change and 2) for which billing options A and B will not work.

TRANSITION MONTH
The LMA goes into effect on the first day of the month after you enter an agreement. Once the LMA is in effect, you will receive monthly invoices that are simpler and easier to check. Again, these are also available to you on My Account. During this transitional month, your invoice will contain charges for:

1) Any regularly billed items from the previous month and
2) This month’s new LMA charges; these are prospective in nature

QUESTIONS? Please contact Customer Service at 1-800-328-4880.
MAXIMIZING YOUR LMA SAVINGS

The LMA’s terms and costs are set for a multiyear period. During that time, you can maximize your savings through the use of several management strategies. An LMA allows you to budget effectively for the terms of the contract through fixed monthly payments. The monthly payments are a pre-tax total and are static regardless of the number of updates and volumes you receive. Savings on subscriptions grow exponentially over time.

ADDING TITLES

At predetermined times during the contract, you have the option of including any eligible Thomson Reuters Westlaw print subscriptions you ordered during the previous 12 months. Your monthly or annual rate will be increased accordingly.

TIP – Titles added to the agreement will allow you to enjoy the same lower year-over-year savings.

ELIMINATING TITLES

If we cease publication of a title covered by your agreement, you may replace it with a comparable title of your choosing. To maximize savings, it is best to eliminate unneeded titles from the agreement during the swapping period and replace with new titles.

SWAPPING TITLES

At predetermined times during the contract, you may replace existing subscriptions with new/different titles that are a better fit with your future needs. The percentage of your collection that is subject to this swapping provision is agreed upon in advance and part of your LMA contract. The duration of the swapping period is 30 days as specified within your LMA contract. You can maximize your savings by:

1) Requesting a swap workbook from your Sales Representative and/or Customer Service Representative
2) Using the interactive workbook for help in choosing which titles to roll in, add, or delete
3) Returning the swap workbook to your Sales Representative for processing

TIP – Cancelling products prior to your swapping period will negatively impact your savings.

SWAPPING EXAMPLE 1

You add $5,000 in titles (roll-ins and new print) while deleting $4,000. The result is a net increase of $1,000. Since you rolled in more than you deleted, your price will be rebalanced upward by $83.33 a month.

SWAPPING EXAMPLE 2

You add $1,000 in titles (roll-ins and new print) while deleting $2,000. The result is a net decline of $1,000. Since you rolled in less than you deleted, your price will not change.
SAMPLE INVOICE & DEFINITIONS

1) BILLING PERIOD
Invoice covers any subscription item shipped to or billed to your account between the dates shown.

2) TOTAL INVOICE AMOUNT
Package and other charges to remit by payment due date.

3) LIBRARY PLAN CHARGES
Charges for the LMA and any other Thomson Reuters Westlaw print packages.

4) INCL
Indicates this item has a monthly or annual charge that is included in the package price.

5) TOTAL (FOR LIBRARY PLAN CHARGES)
Includes all the preceding package subscriptions.

6) SUBSCRIPTION PRODUCT CHARGES
Charges for all other Thomson Reuters Westlaw print materials, excluding online and new sale items that are not part of the LMA or another package subscription. These are billed at their regular subscription rates.

7) SUBSCRIPTION PRODUCT CHARGES TOTAL
Includes all the preceding non-package subscriptions.

If you have questions about an invoice or credit notification, please call Customer Service at 1-800-328-4880.
MANAGING YOUR LMA THROUGH MY ACCOUNT

You can take your LMA to the next level of efficiency by performing all account management tasks online. The My Account portal saves you time and money by allowing you to:

- Make online payments
- Create account history reports
- Check shipping status
THE LMA ALLOCATION REPORT

The monthly LMA Allocation Report can be found on the Reports & Alerts tab on My Account.

From this screen, you can access your monthly LMA Allocation Report, where you can view the titles, quantities, and assigned allocated values included in your LMA contract, and your assigned allocated value for the month. New allocations are viewable monthly – usually on the 15th of each month.

THE LMA ALLOCATION REPORT: EXAMPLE

An LMA Allocation Report is an Excel® spreadsheet produced monthly to help you separate expenses. The spreadsheet is built from the billing statement that is generated early in the month and connected to the LMA and your organization.

Bills are run monthly, and allocation adjustments in between are realized on the following month’s bill. Therefore, the LMA Allocation Report also changes monthly after the bill has run. Allocations can also change if there are product changes, pricing changes, quantity changes, product deletions, etc.
THE LMA ALLOCATION REPORT: HOW ALLOCATIONS ARE GENERATED

1. To calculate the value of your library, add the costs associated with each item.

2. Each item has a retail rate associated with it; each item is also a percentage of your entire library value. For example, if item A has a value of $10, and your entire library is valued at $100, then item A is 10% of the value of the library.

3. When an LMA Allocation Report is generated, the retail percentage of each item is determined based on the retail value of your entire library. For example...

   a. Your Library Total Retail Value = $100
      i. Item A = $10 or 10%
      ii. Item B = $25 or 25%
      iii. Item C = $5 or 5%
      iv. Item D = $60 or 60%

   b. Now, suppose that your Library Total Retail Value = $50. The allocations are built top-down based on the retail allocations in correlation with the LMA value. Since the total value is smaller, the dollar values change but the percentages stay the same:
      i. Item A = $5 or 10%
      ii. Item B = $12.50 or 25%
      iii. Item C = $2.50 or 5%
      iv. Item D = $30 or 60%

THE LMA ALLOCATION REPORT: FREQUENTLY ASKED QUESTIONS

Q: Does the Sum/Subtotal add up to my monthly LMA invoice amount?
A: Yes, the total of the allocation equals your LMA invoice price at the organizational level in a given month.

Q: I found a title that was supposed to be lapsed and not included in my LMA, but it wasn’t. Can this be changed on my report?
A: This title can be lapsed, and the changes will be reflected in the next billing cycle. Since the reports are directly linked to the bill, the corrections won't appear until the next bill.

Q: When will my reports be available each month?
A: On the 15th of each month.

Q: Why can’t the allocation reports be available at the same time the monthly invoice is available?
A: The allocation report is run off the billing report and can’t be generated until the bills have been run for all LMA customers.

Q: How can I get previous LMA Allocation Reports?
A: Request them from Customer Service or your Account Manager.
Q: Why do some titles have $0 allocated to them?
A: Some titles are not currently scheduled for updates; because there is no estimated upkeep for those titles, they have $0 allocated to them. If such a title is scheduled for elimination, it will be removed from your LMA at the next swap period. It's important to remember that the LMA is a library package; therefore, removing individual titles may or may not directly affect your bottom-line price.

Q: Why do the allocation amounts change on the report?
A: Amounts can change based on internal price changes, quantity changes, upkeep changes, etc. One line-item change can affect the allocation amounts of all items in an LMA, depending on which billing option you use.

Q: Can General Ledger (GL), Purchase Orders (POs), or cost center numbers be listed on the report?
A: No. You will need to add them manually.

Q: How do I add a practice area column?
A: Simply export the report into Excel, where you can easily add the column manually. We can’t add one to the report since we don’t know with which practice areas firms want to correlate certain items.

Q: How do I use the report to bill my locations?
A: Export the report into Excel, where it is easy to customize. Simply split the cost by location as you wish.

Q: I have billing option C. Why do my rates fluctuate each month on the allocation report?
A: Rates can fluctuate on the product level if there are changes made to quantities or if the product itself changes somehow. The overall value of the entire deal will not change, but the allocated value to each product and location may change.

Q: I received the wrong product due to an incorrect material number on the order form. How do we correct this?
A: The incorrect title can be lapsed, and the changes will be reflected in the next billing cycle. Since the reports are directly linked to the bill, the corrections will appear on the next bill.

Q: Why can’t we change the allocation report to reflect the items as listed in my contract exhibit?
A: The allocation report is based on all items that are currently in the LMA, reflecting changes made during the swap period and/or other customer-driven requests. If your sub list changes, the report will reflect your changes after the next billing cycle.
OTHER INFORMATION AVAILABLE THROUGH MY ACCOUNT

PAYMENT HISTORY
My Account allows you to check the status of payments made in the past 365 days. The Payment History can be found under the Billing Info tab on the LMA Reports screen.

CREDIT HISTORY
My Account allows you to check the status of credits posted in the past 365 days. My Account shows the titles returned, credit posting date to the account, the amount, and the original invoice number being credited. The Credit History can be found under the Billing Info tab on the LMA Reports screen.

NOTE – My Account does not allow users to print out any credit memos posted to the account. Users need to contact Customer Service for copies of credit memos.
INVOICE LOCATION
My Account allows you to view and print your invoices. To access invoices, go to:

1) Billing information
2) Balance detail
3) The appropriate account number
4) The invoice in question. (Click on this link to see and then print a copy of the original invoice.)

BILLING & PAYMENT
Billing & Payment information can be found under the Billing Info tab on the LMA Reports screen. Click the Balance Detail button to view the screen below.
FREQUENTLY ASKED QUESTIONS

Q: How do I know what is included in our LMA?

Q: Will my invoice state the unit cost for each title?
A: No, the LMA overrides unit costs on individual book subscriptions. The allocated value for each book subscription can be viewed in the Monthly LMA Report found on My Account. You can also reference your LMA contract for the full-year view.

Q: Does our LMA reflect the discounts we previously had on print titles?
A: Discounted pricing may be carried forward in calculating your LMA rate. Certain discounting requirements may apply.

Q: When can we purchase new books?
A: Anytime; additionally, you can roll books into the LMA at your predetermined swapping period, locking in future upkeep costs.

Q: May we cancel books in our LMA?
A: Yes; however, the monthly fee will not be reduced during the LMA’s term. During your swapping period, you may replace books and use them to purchase other books.

Q: Can we return a product in our LMA?
A: You may return a product; however, no credits or refunds are issued for returned products that ship out as part of the LMA because those updates are all included in the LMA package deal.
Q: Does the LMA affect the timing of book updates?
A: No. We ship updates at the same time we ship them to everyone else. Supplemental materials, new disk versions, and all updates are included in the agreement.

Q: When will we receive our monthly invoice?
A: The invoice is generated on the 4th of the month and can be viewed immediately on My Account. Since the LMA goes into effect on the first day of the month after you enter into the agreement, your first invoice is considered the transitional month. During the transitional month, your invoice will contain charges for 1) any regularly billed items from the previous month and 2) this month’s new LMA charges; these charges are prospective in nature.

Q: What happens if Thomson Reuters cancels a title that is in our agreement?
A: You will receive a letter informing you of the change. You may then choose to receive a comparable title.

Q: What if new volumes are added to a title in my LMA?
A: Your agreement covers new volumes for a title included in your LMA; there is no additional charge. Pocket parts, pamphlets, replacement or ancillary volumes, looseleaf pages, related supplemental materials, new disk versions, and updates are included in the agreement.

Q: What happens at the end of the agreement if I do not renew it?
A: Your library goes back to retail pricing for each title you subscribe to, and all previous discounts are removed. You also lose the advantage of compounded savings you have earned over time with an LMA. The longer you remain in an LMA, the more savings you accrue.
ABOUT THOMSON REUTERS WESTLAW PRINT PUBLICATIONS

DISTINCTIVE FEATURES

At Thomson Reuters, we strive to put our customers’ needs at the forefront of our product development and service. We built our reputation as the country’s premier legal publisher by setting and conforming to rigorous standards of accuracy, timeliness, and practicality. The distinctive features of Thomson Reuters Westlaw publications reflect our focus on the customer. These include:

- **NATIONWIDE COVERAGE** – We publish federal and 50-state law: statutes, caselaw, procedural rules, and administrative materials – all with time-saving editorial annotations.

- **LEADING AUTHORS** – Our authors are experts, noted legal practitioners, judges, and scholars. Their analysis and practice guidance help protect practitioners from costly missteps and unnecessary hours of research time.

- **EXTENSIVE RESEARCH AIDS** – Our indexes, tables of contents, and tables of authority are complete and accurate. Numerous practice aids help you find what you need quickly.

- **CASE SYNOPSES AND HEADNOTES** – Written by our staff of attorney-editors, these concise summaries help you find cases that an opinion-only search might miss. They contain terms that the authoring judge may not have used, such as terms of art or words that describe legally significant relationships.

- **THE WEST KEY NUMBER SYSTEM®** – This exclusive method organizes the complete body of U.S. law into more than 400 topics and 100,000 subtopics, with a Key Number for each point of law. It makes your research more precise and efficient. Key Numbers apply to all U.S. jurisdictions and across all Thomson Reuters Westlaw publishing formats (print and electronic).

- **CRAFTSMANLIKE BOOKS** – Thomson Reuters Westlaw books are the work of master printers and binders. They are built to withstand constant use.

- **THOMSON REUTERS PROVIEW™ eBooks** – You can now place eligible ProView eBooks into your LMA. Powered by the Thomson Reuters ProView app, our eBooks enable you to access your trusted legal references anytime, anywhere, on your desktop, laptop, or tablet. They include professional-grade functionality, such as the ability to add notes and highlights, transfer notes to new eBook editions, and verify controlling authority with links to WestlawNext®.
CUSTOMER CONTACTS

GENERAL BILLING, SUBSCRIPTION, AND ACCOUNT INQUIRIES
Customer Service
Phone: 1-800-328-4880 (Mon.-Fri., 7 a.m.-8 p.m., CT)
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My Account website: myaccount.thomsonreuters.com and select West

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WESTLAW ONLINE RESEARCH ASSISTANCE
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